

## JOIN OUR TEAM!

We are growing and looking for teammates that value a cutting-edge entrepreneurial environment along with a strong team approach to getting the work done. Schechter is a 3<sup>rd</sup> generation financial advisory firm focused on Investments, Private Capital and Life Insurance for High Net Worth (HNW) clients. We are a curious, knowledgeable team that always strives to deliver the right strategy for the client.

We dig deep into the numbers, we vet, and research concepts and we deliver with the highest level of service. **It's who we are.**

## OUR CORE VALUES



Clients' needs first



Create a complete "WOW" experience for clients and our staff



Cutting edge knowledge – we strive to be the experts



A special place to be

Watch  
our  
video



## SENIOR INSURANCE ANALYST

### JOB DESCRIPTION

The Senior Insurance Analyst is an analytically driven high-achiever with a very technical mindset. The individual will work in conjunction with our internal advisors and strategic partners across the country to create client-ready presentations, research & design unique insurance programs for our high-net worth clients and provide a WOW client experience while always putting our clients' needs first. The Senior Insurance Analyst also possesses excellent communication and presentation skills to ensure our product designs are well thought out and capitalizes on best-in-class insurance industry opportunities.

### ESSENTIAL JOB FUNCTIONS

- Subject matter expert on all life insurance products in the business
- Recognize new opportunities to market and position products and improve service and sales
- Perform due diligence to develop an understanding of carriers' strengths and weaknesses
- Execute thorough back testing and scenario testing to find most optimal life insurance design strategies
- Develop and enhance industry and product knowledge to effectively communicate such with Advisors and internal team members
- Maintain in-depth knowledge of life products and software systems for case design, analysis, and presentation
- Analyze life insurance product illustrations, product analysis, and technical case design for life insurance proposals and create presentations for Advisors and team members
- An advanced insurance resource expert for the office
- Quickly respond to Advisors' inquiries relating to complex and technical questions while demonstrating an understanding of multiple carriers' product portfolios and cross selling opportunities
- Assist in the design and production of professional high-level marketing presentations and supporting materials

### SKILLS/EXPERIENCE

- Preferably three or more years of professional experience in the life insurance field from high level, analytical perspective
- Strong attention to detail and accuracy, with ability to organize, prioritize, and manage multiple tasks within set deadlines
- Proven analytical, problem-solving and decision-making skills
- Mastery of Microsoft Office Suite: Outlook, PowerPoint, Word, and most importantly, Excel
- Proficiency using carrier life insurance illustration software, a plus
- Bachelor's degree required
- Analytical mind
- Superior verbal and written communication skills
- Strong follow-through skills
- Enthusiasm and high level of accountability
- Passionate about exceeding clients' and teammates' expectations

### OUR PROMISE

- Unique work environment with strong employee culture and values
- Competitive salary with Merit and Team Bonus eligibility
- Flexible work from home policy
- High quality benefits including Medical, Dental, Vision, Disability, HSA, FSA, 401K, etc.
- Paid time off

Please send your resume to [careers@schechterwealth.com](mailto:careers@schechterwealth.com)